

San Bernardino BHMIS Phase I End User Training Agenda

CalPM Billing – Billing IT		
Date:		
Event:	Phase I End User Training	
Time:		
Lunch:	11:30AM – 12:30PM	
Location:		
Objective		
Objective		
DAY 1 Date Time: 8:30AM – 4:30PM		
Estimated Start/End Time	Topic	Notes
8:30 – 8:45	Avatar Basics Logging In and Out Navigation of Home View My Forms Clients Widget Navigation of Chart View	
8:45 – 9:15	Admission (Outpatient) CSI Admission Program Assignment Diagnosis CalOMS Admission CSI Assessment (Call Intake) / CSI Assessment Discharge	
9:15 – 9:45	Client Update Bundle Update Client Data Financial Eligibility Client Condition Pregnancy Emergency Contact Information	
9:45 – 10:00	Super User Discussion	
10:00 – 10:15	BREAK	
10:15 – 11:00	Financial Bundle Financial Eligibility Fast Financial Eligibility Review MEDS Information Review MEDS Report Real Time Inquiry (270) Request	POE – Review Lir Episode/Financia
11:00 – 11:45	Ancillary and Ambulatory Services Client Ledger Client Charge Input Recurring Charge Input	

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	Edit Service Information Spreadsheet Edit Service Information Delete Service File Import for Uploading Services	
11:45 – 12:45	LUNCH	
12:45 – 1:30	Billing Reports Financial Eligibility Report Loss of Eligibility Report Two out of Three Match Report Ad Hoc Reports Open Claims Reports Advance Billing Compliance Report Billing Guarantor 9999 Clean up Report Share of Cost Report Revenue Report Monthly Close Out Reports Aged Accounts Report	
1:30 – 2:15	Interim Batch Creation Create Batch File for Interim Billing Edit Batch File for Interim Billing Close Charges Quick Billing	
2:15 – 2:30	Break	
2:30 – 3:15	Bill Production Print Bills Re-Print Bills Electronic Billing Claims Follow Up Automatic Medi-Cal Revenue Assignment Family & Self Pay Bills Electronic Rebilling Service Assignment	
3:15 – 3:30	Super User Discussion	
3:30 – 4:30	Remittance Processing Individual Cash Posting Spreadsheet Cash Posting Quick Cash Posting 835 Health Care Claims Payment Advice	
4:30	Review and Wrap Up	

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DAY 2 Date Time: 8:30AM –4:30PM		
Estimated Start/End Time	Topic	Notes
8:30 – 8:45	Recap from Day 1	
8:45 – 9:15	State Reporting CalOMS Submission CSI Submission	
9:00 – 10:00	System Maintenance & Billing Set Up (Part 1) Billing Setup Maintenance Guarantor/Payers Benefit Plans Claim Adjustment Group Reason Code Definition Guarantor Program Billing Defaults Practitioner Enrollment Quick Billing Rule Definition	
10:00 – 10:15	Break	
10:15 – 11:15	Advanced Billing Rule Definition Service Code Setup Service Fee Cross Reference Program Maintenance Posting Adjustment Code Definition California MEDS File Load	
11:15 – 12:00	Exercise 1 Create 3 Clients, 1 SUD, 2 MHOP and 1 MH mode 10. Complete the following forms on clients, Admission (outpatient), CSI Admission (MH Only), Cal OMS Admission (SUD Only), Diagnosis, Financial Eligibility (at a minimum add 1 insurance, M/Cal and County), Add pregnancy indicator is applicable and billing group. Then add charges to all 3 clients, add at least one Non billable, 1 371 and one billable code.	
12:00-1:00	Lunch	
12:00-4:00	Super User Lead Session / Open Discussion – The afternoon will be a review of primary functions and responsibilities, and will allow more time to practice and discuss main duties of staff and/or department	
4:00 – 4:30	Review and Wrap Up	

Specific Training Notes for this Course
